

Maryland Health Benefit Exchange Study of Navigator Plan and Consumer Assistance Key Informant Work Plan

Overview

Manatt Health Solutions (Manatt) was retained by the Maryland Health Benefit Exchange (MD HBE) to develop recommendations for the design and operation of Maryland's Navigator Program pursuant to the Maryland Health Benefit Exchange Act of 2011. A critical component of this effort is engaging stakeholders to leverage expertise, understand policy priorities and engender buy-in and support for the MD HBE and the Navigator Program. Specifically, stakeholder input is needed regarding:

- The design of the Navigator Program including, but not limited to Navigator:
 - Functions,
 - Selection criteria,
 - Training, certification and/or licensure requirements,
 - Oversight and compliance,
 - Capacity, and
 - Program financing and long-term sustainability;
- The relationship of existing agent/broker/producers in the state to the Navigator Program and the Exchange;
- The options and best practices for consumer engagement including:
 - Existing resources in the state that may be leveraged,
 - Best practices from earlier public insurance outreach and enrollment campaigns, and
 - Best practices and outreach strategies in the private market, including outreach to small group employers and individuals not qualifying for public insurance;
- Key issues and potential barriers to outreach and enrollment of target population; and
- Anticipated challenges and potential consequences of various design options.

This document describes Manatt's Key Informant Work Plan, which details the approach for stakeholder solicitation and feedback.

Approach

At the project kick-off meeting on September 7, Manatt solicited and received feedback from the MD HBE's Navigator and Enrollment Advisory Committee (Advisory Committee) regarding various constituencies and organizations to be included in the stakeholder engagement process. This plan reflects the feedback from the Advisory Committee.

Manatt will solicit stakeholder input through four mechanisms:

- Facilitated small group discussions with targeted constituencies, including consumers, brokers, small business, health plans, and providers;
- Interviews with individuals and/or entities with expertise, information or data that will inform the planning effort, including the Maryland Insurance Administration and Department of Health and Mental Hygiene

- Public comment, and
- Input and consultation with the Navigator and Enrollment Advisory Committee (Advisory Committee) and the general public at the Advisory Committee meetings.

Each of these mechanisms is explained, below, in greater detail.

Facilitated Group Discussions

Given the interest in engaging a large number of constituent groups, Manatt will host 6 facilitated group discussions with targeted constituencies. This approach will both enable broad participation within each constituency group and engender robust discussion as various participants are able to react to and enrich ideas and comments from the group.

Manatt suggests scheduling 90 minute facilitated discussions with the following constituencies:

- Consumers/Consumer Advocacy Groups (*September 29; 9 to 10:30*)
- Commercial Health Plans (*September 29; 11 to 12:30*)
- Medicaid Health Plans (*September 29; 2 to 3:30*)
- Small Business (*October 5; 9 to 10:30*)
- Brokers (*October 5; 11 to 12:30*)
- Providers (*October 5; 2 to 3:30*)

A listing of the specific groups to be targeted for each of these meetings is in Appendix A. Participation will be by invitation with up to 12 attendees per meeting.

In preparation for the facilitated group meetings Manatt will organize lines of inquiry and discussion questions to facilitate the meeting and ensure it drives toward actionable guidance and recommendations. An interview guide will be developed for each constituency group to enable deep exploration of key issues (interview guides are due September 23, but will be submitted to the Co-chairs and State in a rolling basis in advance of the September 23 deadline).

Outreach and Solicitation of Participation

Manatt will draft a letter to be sent under the signature of the Executive Director of the MD HBE which explains this effort and requests that the organizations participate in the group discussion. Manatt will develop the draft letter by September 15 and seeks feedback within 24 hours to facilitate expedited distribution. Given the short time line associated with this effort, Manatt seeks to distribute the letter by September 19.

Manatt will distribute the letter and perform outreach to each organization via phone calls and emails to solicit participation. Manatt will track responses in an excel spreadsheet and keep the State and Advisory Board Co-chairs apprised of attendance twice a week (during the Wednesday check in call and again on Friday afternoon).

Location of Meeting

Manatt will leverage State meeting space for these meetings. Ideally, this meeting space would be able to accommodate up to twenty people comfortably. Overhead projection is nice to have but is not necessary. Flip charts, a tripod for the chart and markers will be needed to capture relevant points. Manatt seeks to confirm if space is available at the targeted times and dates by September 16th.

Facilitation of Meeting

Either the Manatt Project Director or Project Manager will facilitate each meeting. Manatt will also have a dedicated note-taker available at each meeting.

Meeting Synthesis

The outputs from the meeting will be documented and submitted as a part of the Key Informant Report. A summary of that report will be presented during the October 12th Advisory Committee meeting and the written report is due to the Co-chairs and the State on October 14th.

Targeted Research Interviews

Manatt will perform telephonic research interviews with entities that have data, information or expertise that will inform the report and recommendations. For example, some of these interviews will focus on existing outreach processes and/or programs. We suggest interviews with the following entities:

- Maryland Insurance Administration (MIA)
 - Therese M. Goldsmith, Commissioner, MIA
 - Other MIA participants, as suggested by Therese
- Maryland Department of Health and Mental Hygiene
 - Chuck Milligan, Medicaid Director (or another representative who can discuss existing outreach programs)
 - Susan Tucker, Executive Director, Office of Health Services
 - Debbie Ruppert, Executive Director, Office of Eligibility Services
 - Margaret Laub, Chief Executive Officer, Policy Studies Inc (Medicaid enrollment broker)
 - Dr. Carlessia Hussein, Director, Office of Minority Health and Health Disparities
 - Frank Kirkland, Director, Developmental Disabilities Administration
- Maryland Department of Human Resources
 - Rosemary Malone, Executive Director, Family Investment Administration (Local Departments of Social Services)

All interviews will be conducted across the weeks of September 19th and 26th and October 3rd.

Outreach and Solicitation of Participation

For the state entities, Manatt respectfully requests that the State provide a warm introduction to the appropriate State entity or individual(s). Once the initial introduction has been made, Manatt will work with the contact(s) to schedule a phone interview. Manatt will track progress in scheduling each interview in an excel spreadsheet and keep the State and Advisory Committee Co-chairs apprised of attendance twice a week (during the Wednesday check in call and again on Friday afternoon).

Location of Meeting

These interviews will be conducted via teleconference. Manatt has its own teleconference lines for this effort.

Facilitation of Interviews

Manatt will have either the Project Director or Project Manager facilitate each interview. Manatt will also have a dedicated note-taker available at each interview.

Meeting Synthesis

The outputs from the interviews will be documented and submitted as a part of the Key Informant Report. A summary of that report will be presented during the October 12th Advisory Committee meeting and the written report is due to the Co-chairs and the State on October 14th.

Public Comment

Another venue for solicitation and feedback will be public comments. Having a public comment period will serve several purposes. First, stakeholders who attend the group discussions may find that they have more to add to the discussion, and submission of written comments allows an opportunity to expand upon or clarify the opinions offered in the group sessions. Second, if individuals are not able to attend the group discussions, they will still have an opportunity to contribute to the conversation in a meaningful way by providing their comments. Additionally, by having a public comment period the Exchange can be confident that anyone who wants to provide input in the role of the Navigator has an opportunity to do so.

Manatt will draft a short survey that any stakeholder can use to provide input into Navigator design and development for the MD HBE. Questions will be open ended and will accommodate varying lengths of responses. Manatt will submit this survey to the Co-chairs of the Advisory Committee and State by September 16th for review and comment.

Location of Solicitation for Public Comment

The public comment questions will be placed on the MD HBE website, which is a part of the Maryland Department of Health and Mental Hygiene's website.

Outreach and Solicitation of Participation and Synthesis of Comments

The MD HBE will advertise the availability of the public comment period through its website and Advisory Committee membership. Where possible, the MD HBE or State will solicit written input from the public through other, established communication and outreach mechanisms.

In addition to solicitation from the MD HBE and the Advisory Committee, Manatt has identified in Appendix B additional stakeholders who may want to provide input into the Navigator process. Manatt will send two emails to each of these stakeholder organizations to solicit input.

Members of the public will be given two weeks to submit responses electronically. Manatt will collect and synthesize the results of the questionnaire and include this input in the interview report, which is due on October 14.

Advisory Committee Meetings

Advisory Committee meetings represent another way to solicit input from both Advisory Committee members and the general public. The Advisory Committee is formed of a wide range of individuals who represent various aspects of the health insurance market in Maryland, including consumers, brokers, insurers and other key stakeholder groups. Manatt will seek Advisory Committee member input on all aspects of the Navigator Program study at the regularly scheduled meetings, which are currently scheduled on September 26th, October 12th, October 24th, November 2nd and November 7th. In addition, the general public is invited to provide comments at each Advisory Committee meeting. These comments from the Advisory Committee and the general public will also be included in the interview report, due on October 14.

Appendix A:
Target List of Organizations for Facilitated Group Discussion

Targeted Population	Targeted Organizations
Consumers	Advocates for Children and Youth
	American Cancer Society
	Baltimore Health Care Access
	Baltimore Healthy Start
	Baltimore Substance Abuse System, Inc
	Health Action Forum of Prince George's County
	Health Care for All Maryland
	Hopkins Urban Health Institute
	Health Care for the Homeless
	Interdenominational Ministerial Alliance
	NAACP, Maryland Chapter
	University of Maryland School of Law
	Latin American Youth Center
	Maryland Disability Law Center
	Maryland Women's Coalition for Health Care Reform
Small Businesses	Garrett County Chamber of Commerce
	Baltimore County Chamber of Commerce
	Enoch Office Equipment
	Maryland Retailers Association
	Salisbury Area Chamber of Commerce
	The Crab Shanty
	US Hispanic Youth Entrepreneur Organization
	Washington Area New Automobile Dealers Association
Health Issuers - Private	United Healthcare
	Kaiser Foundation Health Plan of Mid-Atlantic States
	Coventry Healthcare, Inc.
	CareFirst BlueCross BlueShield
	Aetna
Health Issuers - Medicaid	AMERIGROUP Community Care
	Coventry Healthcare, Inc.
	Diamond Plan
	Jai Medical Systems
	UHC Community Plan
	Maryland Physicians Care
	MedStar Family Choice
	Priority Partners
Agents/Brokers	BenefitMall
	Cross & Wood Associates Inc
	Edwards, Sanders and Associates
	Golden & Cohen
	Grabner Financial
	Group Benefit Services
	Insurance Solutions
	Keller Stonebraker Insurance
	Landmark Insurance
	Mullaney Insurance Incorporated
	Pioneer Financial
	RWO Insurance
	Schaefer Financial Group
	Waring-Ahearn Insurance Agency
Providers	Baltimore Medical Systems (FQHC)
	Community Health Integrated Partnership/Maryland Community Health System
	Elizabeth Cooney Care Network
	Johns Hopkins

	Lifebridge
	MedChi
	MedStar Family Choice
	Mid-Atlantic Association of Community Health Centers (MACHC)
	Nurse Practitioners Association of Maryland
	The Coordinating Center for Home and Community Care, Inc
	Maryland Association of School-Based Health Care
	Maryland Hospital Association
	Rebecca Ferguson, DNP

Appendix B:

Target List of Organizations for Comment and Outreach

In addition to the open public comment solicitation, we suggest directly requesting written input from the following entities:

- Pre-Release and Post-Release Transitional Programs, Maryland Division of Correction
- Maryland Higher Education Commission (to distribute to individual institutions)
- Allen DeLeon, Chair, Maryland Association of Certified Public Accountants
- Michelle Green Clark, Executive Director, Maryland Rural Health Association
- Kerry O'Brien, Director of Services, CASA de Maryland
- Jessica Mendoza, Program Director, US Hispanic Youth Entrepreneur Education
- R. Dane Rianhard, President, Maryland Association of Health Underwriters

Additional organizations will be added to this list, as needed.

Appendix C:

Detailed Key Informant Work Plan

Stakeholder Engagement Plan	Team Lead	Due Date	Deliverable
PROJECT MANAGEMENT			
1. Kick off meeting with Advisory Committee.	Manatt	Sept 7 2011	Draft work plan, Draft list of informants
2. Bi-weekly status meetings	MD HBE / Manatt	Sept-Nov 2011	
3. Submit stakeholder engagement plan to MD HBE.	Manatt	Sept 14, 2011	Stakeholder Engagement Plan
STAGE 1 – Identify Informants			
1. Identification of key issues.	Manatt	Sept 7, 2011	
2. Identification of target consumers (uninsured, those who will be eligible for Exchange)	Manatt	Sept 7, 2011	
3. Conduct initial research of Maryland stakeholders.	Manatt	Sept 14, 2011	
4. Solicit input on key informants from Advisory Committee	Manatt	Sept 7, 2011	
5. Develop final informant list.	Manatt	Sept 15, 2011	List of key informants
STAGE 2 – Conduct Interviews			
1. Logistics			
1. Identify interview dates	Manatt	Sept 13, 2011	
2. Submit draft invitation to MD HBE for review	Manatt	Sept 15, 2011	
3. Reserve meeting space and/or conference lines	Manatt/MD HBE	Sept 16, 2011	
4. Send invitations/track responses	Manatt	Sept 19, 2011 – October 7, 2011	
2. Develop Interview Guides (consumer, insurer, broker, other)	Manatt		Interview Guides
1. Review draft interview guides with Advisory Committee Co-chairs	Manatt	Sept 21, 2011	
2. Distribute interview guides to Advisory Committee	Manatt	Sept 23, 2011	
3. Review interview guides with Advisory Committee	Manatt	Sept 26, 2011	
4. Incorporate feedback	Manatt	Sept 28, 2011	
3. Facilitate meetings/interviews	Manatt	Sept 29, Oct 5, 2011 for meetings; through Oct. 10 for interviews	
STAGE 3 – Public Comment			
1. Develop public input questionnaire	Manatt	Sept 16, 2011	Public Input Questionnaire
1. Review with Advisory Committee Co-chairs	Manatt	Sept 21, 2011	
2. Incorporate Co-chair feedback and distribute to Advisory Committee	Manatt	Sept 22, 2011	
3. Review questionnaire with Advisory Committee	Manatt	Sept 26, 2011	
4. Incorporate feedback	Manatt	Sept 26, 2011	
2. Post questionnaire to website	MD HBE	Sept 27, 2011	

3. Collect responses	Manatt/MD HBE	Oct 7, 2011	
STAGE 4 – Compile Findings			
1. Submit presentation on interview findings to State/Co-chairs.	Manatt	Oct 11, 2011	
2. Compile findings and synthesize into report	Manatt	Oct 12, 2011	
3. Review presentation with Co-chairs	Manatt	Oct 12, 2011	
4. Present initial findings to Advisory Board.	Manatt	Oct 12, 2011	Presentation on key informant findings.
5. Submit report to Advisory Co-chairs and State	Manatt	Oct 14, 2011	Key Informants Interview Report